ISSUE 3 2016

PERSPECTIVES

A PUBLICATION FOR THE MEMBERS OF THE ASSOCIATION OF FRATERNITY/SORORITY ADVISORS

THE MONEY ISSUE

ACCESSIBILITY
Rimmaudo / Crawford

CAMPUS & HQ
FUNDING MODELS

afa

LETTER FROM THE PRESIDENT

We are all tasked with some level of fiduciary responsibility as it relates to our roles on campus and within our organizations and businesses. Whether it be wrangling a programmatic or operational budget, or determining effective outreach to potential donors, stewardship of financial resources should be a high priority.

Take a moment to think about your ability to distribute funds as you execute job specific tasks. What are the questions you ask yourself and those you work with when making final decisions? Which constituents does your initiative(s) involve? Who will manage and/or execute said initiative? Is it a recurring or one-time opportunity? The answers to these questions will be different depending upon your role within your organization. However, everyone has to have rationale to support financial decision making. Even as the Board of Directors for this Association, we have to factor in the aforementioned questions and many more as we uphold our duty to be financial stewards of AFA.

As you think through the justifications and map out your spending and/or giving plan, I would offer a few things to consider as deciding factors which include but are not limited to: potential impact/reach of the initiative, cost effectiveness, opportunities to collaborate and extend monetary gain, priorities as it relates to a strategic plan or assessment activity, and obligation to support the organization.

This issue will provide a variety of funding models, solutions to spending challenges, and much more. As you read through, take note of possible changes that could benefit you in your professional role. Responsible spending is a skill that will eventually come under your portfolio, and accountability to manage this area will be held at a very high level.

Veronica Moore
President

LETTER FROM THE EDITORS

Finances, budgets, fundraising… for some of you this is the most exciting part of the work you do. You love managing money, determining how to fund programs, build houses, maintain or grow staff, establish relationships with donors, and everything else that comes along with the financial side of fraternities and sororities. For others, financial management causes great anxiety. Some sit in their offices staring at a small allocation of funds trying to figure out how they are going to provide the educational programming being demanded to "fix" a chapter or a community. The reality for all of us is we might be missing the knowledge of how money truly impacts the various sides of the work that we do.

In any industry, we know decisions are rarely made without thinking about the financial implications. How will we fund this now? How will we fund this long term? What is our return on investment? Is this expense worthwhile? How will we know it made an impact? What will be affected by our decision to spend resources in this area? Will we survive this? These questions are no different in fraternity and sorority life - even the AFA Foundation has to ask these questions.

We've heard the phrase (and perhaps repeated it to students), "How you spend your money is a representation of what you value." Yes, absolutely, but we also know it is not that simple.

We know when faced with the need to close a chapter, multiple values (sometimes opposing) are considered. And on occasion, the decision is made to keep a poorly behaving chapter open. Does this mean an organization values the poor behavior? Perhaps, but it is not that simple.

We know many campuses are struggling with funding sources. The recently published AFA White Paper pointed to lower salaries running hand-in-hand with less experience. Turn over for campus-based professionals is very high. Does this mean an institution values replacing a staff member every 2-3 years? Perhaps, but again, it is not that simple.

Questions about resources (finances and staffing, specifically) are continually popping up in various forums among fraternity/sorority professionals. Some folks are managing shifting state budgets, others are managing the need for more staff. We thought it was time to look at fraternity/sorority finances in a new light - providing the various perspectives on the impact money has in our Association, in our headquarters, and on our campuses. We hope this issue reduces assumptions, encourages questions, and leads to just a little bit better understanding of one another.

Annie Carlson Welch & Emilee Danielson-Burke
Co-Editors

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ASSOCIATION OF FRATERNITY | SORORITY ADVISORS

Perspectives is the official publication of the Association of Fraternity/Sorority Advisors, Inc. (AFA). Views expressed are those of the individual authors/contributors/advertisers and are not necessarily those of the Association. AFA encourages the submission of articles, essays, ideas, and advertisements.

Submissions should be directed to the Editor, advertising queries to the staff.

Submission Deadline:

Issue 4: November 1, 2016

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Because of an editing error, a diagram on page 30 in printed editions of Perspectives 2016 Issue 3 incorrectly states that Delta Upsilon Fraternity provided a gift of $5,000 toward Speech Interpreters for the Annual Meeting.

This gift is provided annually by Delta Zeta Sorority. Our apologies to Delta Zeta for this error. Corrections have been made to the electronic version of Issue 3.

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ACCESS-IBILITY

GABRIELLE RIMMAUDO AND JAMES CRAWFORD

"WELL, IT'S NOT FOR EVERYONE."

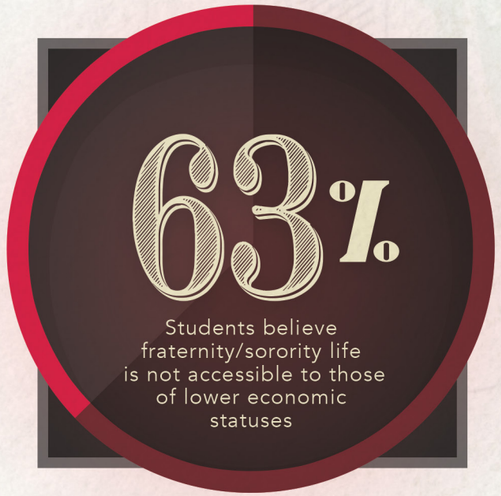
How many times have we heard this phrase when a person's membership or candidacy for such is called into question? Sometimes this statement is rooted in the results of a person's behavior. Sometimes time restraints get in the way of how much a person can dedicate to the organization. And, at other times, this phrase is prevalent whenever the conversation circles back around to money.

Whether someone is considering membership or is currently a member juggling ways to pay, there can be a barrier to membership existing with affordability of the experience. In the current trend of examining how diverse and inclusive our organizations are or need to be, it is essential we consider an area that can be rather touchy: the overall cost of joining and maintaining membership in a fraternity or sorority.

What if this barrier is not one we can ignore anymore?

Increasingly, inter/national organizations are trying to stretch each dollar to capitalize on the services they provide their chapters and members. What if we are missing out on a future Executive Director or incredible member because they do not have the level of funding to afford the application fee or the continued membership experience?

In a recent poll of Washington University in St. Louis students, 63% of students polled believed fraternity/sorority life was not accessible to students of lower economic statuses (Marcus, 2015).



An article from the University of Southern California's The Daily Trojan stated , "For some students on financial aid, simply joining takes food off their family's table"(Sobel, 2016). Such a statement makes it quite difficult to convince someone to join if they are responsible for more than just themselves and their academics. Are we casting a net big enough to perform recruitment/intake? Generally speaking, each community has some sort of council or chapter-specific processing fee to be a part of the recruitment/intake process. Then there are expenses to begin an aspirant process or a new member experience that are either charged at the chapter, regional, or inter/national level. This does not begin to touch all of the costs one might incur purchasing paraphernalia, "big/little" gifts, attire, or attendance at chapter events. Non-financial hidden costs of seeking membership are the cost of time, connections to family and friends (especially if they do not condone membership), academic success, and more. If a member is spending time attending an educational weekend retreat, less time is dedicated to working in order to offset the new expenses they are accruing.

It is important to acknowledge the cost of joining and maintaining membership can vary by region, council, campus, and organization. Nationally, many organizations are managing operating budgets rivaling moderate-sized businesses. Others are expecting membership intake costs to take last year's savings. With these steep numbers, potential members from lower socioeconomic backgrounds may be turned away from recruitment/intake or may self-select out of the recruitment/intake process before they get a chance to learn about financing options. Considering the financial strains and sizable loans students borrow to cover the cost of education, undergraduate members are having to explain, line by line, the benefit of being a member in dollars.

The average graduate from the class of 2016 in the United States has $37,172 dollars in student loan debt; up 6% from last year (Student Loan Hero, 2016). College is becoming more expensive, and fraternities and sororities need to begin to adjust to this for the benefit of our members.

When recruitment/intake is done right, potential members are told exactly what they will be responsible for financially. They are given transparent answers not only about how much the organization will be charging but what "hidden expenses" might exist within the experience. Some potential members might be able to afford recruitment/intake but could be diswayed due to not being able to afford the full experience of membership. Flexible payment plan options are one way to encourage potential members to join.

Another component to examine are the message we are sending to potential new members. For example, in a Panhellenic process, just because undergraduate members are being transparent about costs and dues, there is easily an additional message being sent when some sorority chapters have women wearing very recognizable name brands an average, middle-class college student may not be able to afford. Additionally, if the cost of membership is too high, organizations can look hypocritical within the philosophy of "values-based recruitment." If communities want to maintain a meaningful recruitment/intake process, they should consider the expenses of the process. Costs could be reduced or excess funds could support financial aid for membership.

Over the next few years it will be critical to consider a new generation coming to college: Generation Z. The teenagers composing this generation are the adolescents who experienced the financial crisis of 2007 and 2008. These future students saw their parents lose jobs, experienced budget cuts in their home, and likely had to work a part time job in high school. They are often characterized as cynical and jaded by the economy. These future members will be examining funds more than ever before and will be approaching joining a member-based, dues-based organization with a bigger emphasis on the question "what's in it for me?" (Williams, 2015).

It is important for councils and chapters to thoughtfully consider their total operating budget in order to determine ways in which they can aid their members in maintaining good financial standing.

In a time when fraternities and sororities are continually needing to justify their existence on a college campus, chapters should be finding ways to reduce financial burdens among members? Just because someone might be in the "bottom third" of engagement within the chapter due to working several jobs while in school, does not make them a "bad member." That student may not have the privilege of being able to dedicate a high level of time to the operation of the organization. In a society driven by a consumer-based model, it is imperative that professionals in fraternity/sorority life show the return on investment through quantitative data.

Gabrielle Rimmaudo is the Director of Growth and Education for Chi Psi Fraternity in Nashville, TN. Gabrielle is a graduate of George Mason University and the University of South Florida. She is a member of Zeta Tau Alpha. Outside of work she enjoys running, yoga, and visiting local coffee shops in the cities she visits.

James Crawford is a Coordinator of Greek Life at Vanderbilt University where he currently advises the Panhellenic Council but has had the fortune of advising all three of Vanderbilt's councils (NPHC, IFC, Panhellenic) throughout his tenure. In addition to professional responsibilities, James serves as a Pi Beta Phi Critical Conversations facilitator, a volunteer for the Association of Fraternity/Sorority Advisors, a member & volunteer of the Delta Chi Fraternity, and is a graduate of the University of North Carolina at Wilmington and the University of South Carolina.

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Chi Omega Fraternity

Visit **afaf1992.org** to make an "In Honor Of" gift to honor award recipients.
Please list the award recipient(s) in the comments box, and the AFA Foundation will share the list of donors with the award recipients after the Annual Meeting.

Please process all gifts prior to **November 1** in order to receive cumulative giving recognition at the 2016 Annual Meeting.

changing the world of

fraternal FUNDRAISING

BEN PENDRY

Over the course of any given summer, fraternities and sororities celebrate their accomplishments during their conventions. This summer was no different, and the stories being told are fantastic! More education is being provided than ever before, more money is being donated to charitable causes than ever before, and our organizations continue to soar in membership.

These stories matter and how foundations tell them impacts how their donors feel about their personal charitable giving. Organizational needs are ever-growing and foundations are charged with knowing and responding to those needs and then celebrating the impact. Let us use the AFA Foundation as an example. Our Foundation engages AFA members to tell us what they need and want from their association membership. When it comes time for the Foundation to allocate resources, it is imperative that we have those needs at the forefront of our deliberation. As a fundraiser I am overjoyed because the stories of our grant recipients and donor impact are so meaningful. We share these stories to celebrate success and advancement in our association… and it conveniently helps drive more fundraising.

Generally speaking, philanthropic donations across the United States continue to grow… well kind of, but it would be getting in the weeds to talk about the dollar figure as a percent of the U.S. Gross Domestic Product. Suffice to say that I believe our industry's foundations are doing a decent job of communicating the impact of the gifts they receive. Within the AFA Foundation, I strongly believe that we must do a better job of communicating impact of our grants from the Foundation to the Association. This communication should include impact on membership, impact on our profession, impact on fraternity/sorority overall, and, of course, impact on return gifts to the foundation. As an industry, how do we become better than "okay" at communicating our impact?

Aside from religious giving, colleges and universities are the largest recipient of nonprofit charitable giving. Fraternal giving has been one of the "little siblings" to colleges and universities for, well, forever. While I believe fraternities and sororities punch above their weight with fundraising, I also believe that there is enormous potential in what we can and should be doing when it comes to using our affinity to shape and impact the undergraduate experience.

During my tenure with the North-American Interfraternity Conference Foundation (2007-2011), I was fortunate to see some of the groundwork that our fraternal foundations were putting in place that has led to massive increases in giving. I will provide some thoughts, but I encourage you to review the NIC Foundation website (nicindy.org/foundation) for additional information on how NIC organizations have increased charitable giving.

Fraternal fundraising is GROWING for three reasons:

1. **Affinity** - Membership in fraternities and sororities is for life, and this affinity is strong and powerful. Alumni believe in what their organizations are doing when it comes to transforming the fraternity/sorority experience. Capitalizing on this affinity means pulling at heartstrings and helping alumni learn about how their dollars benefit the education of today's undergraduate leaders and the long term success of their chapters.

2. **Necessity** - Fraternity/sorority members and their parents are expecting more and more from the fraternal experience. As highly visible organizations which have asked to be treated with higher expectations, there is a need to respond to those expectations in a meaningful way. Much of that response revolves around leadership and education. These two areas are prime areas for fundraising and charitable support. Therefore, fraternity/sorority foundations have the ability to capitalize on leadership and education with their donors to solicit support which inherently strengthens their organizations.

3. **Opportunity** - The generation of members who are currently in their prime giving years (early retirement) have historically been some of the most generous donors to their organizations. Fraternities and sororities, like nearly all other causes, are benefitting from one of the greatest periods of wealth accumulation and transfer in the course of human history.

These are broad overviews of the shifting trends in fraternal fundraising.
What does all this mean for the AFA Foundation? I'm glad you asked.

We are investing in our infrastructure as a foundation so that we can be better support our donors and build capacity for the future. Our job as a board is to ensure the current and future health of the foundation so that our donors can be assured that their gifts are being put to work to create the desired future state which is captured in our mission.

During this, the 40th anniversary of the founding of the Association we are asking that you think

about the AFA Foundation as a way to help us celebrate the growth and the evolution of our profession. Your Foundation has helped to establish nearly 20 permanent endowments which support professional staff to attend the annual meeting.

Over the last five years, money raised by the AFA Foundation has provided educational grants back to the association to fund initiatives such as the First 90 Days Program, AdvanceU, keynote presentations, and the Graduate Training Track.

The truth is, nearly everything that the Association does is "fundable" through the Foundation.

The work our donors make possible makes our Association and our colleagues stronger. The programs funded through gifts to the foundation make your industry stronger. We believe that in the 40th year of the Association we have the opportunity to lift up this organization and take a giant step toward realizing the future that we all want to be a part of.

Ben Pendry serves as Chair of the AFA Foundation board. He is a member of Sigma Chi Fraternity and a graduate of Western Carolina University. He received his Certified Fundraising Executive (CFRE) designation in 2014 and is the Director of Prospect Strategy & Research at UNC Charlotte. Ben, his wife, Jenna, and their son, Branch, live in Charlotte, NC.

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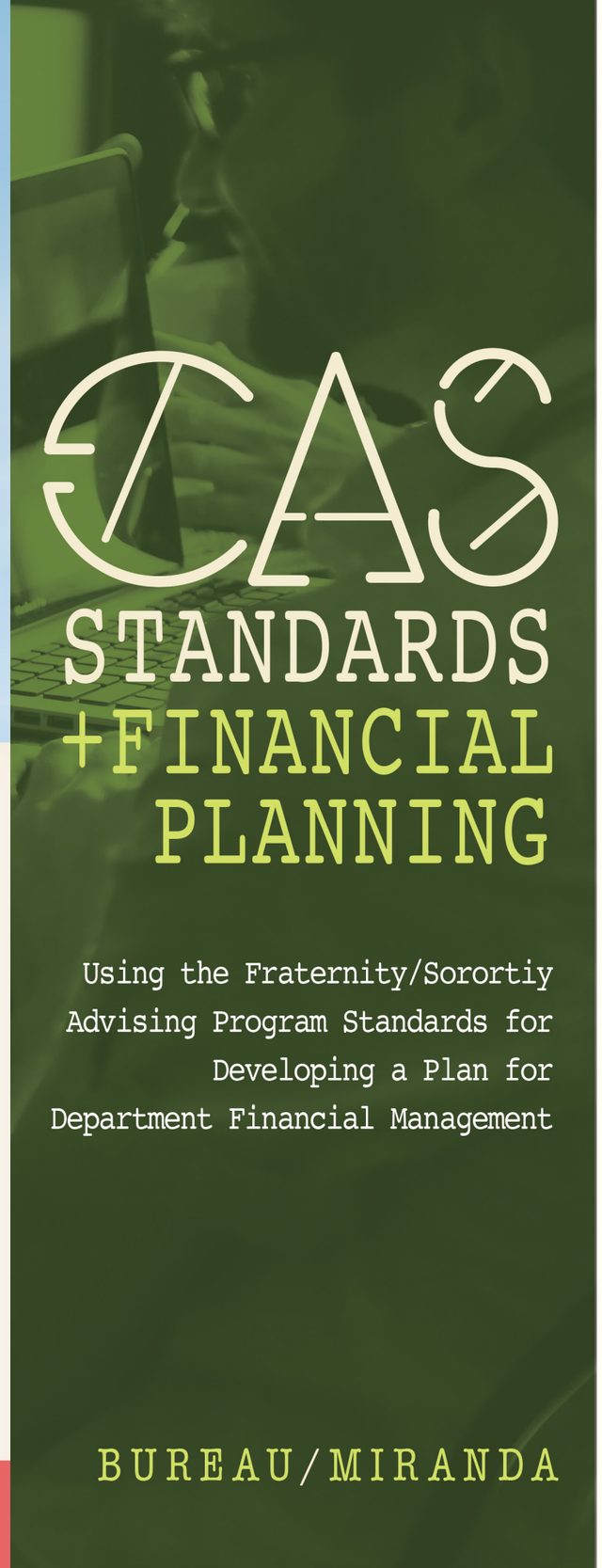


Higher Education budgets are as tight as ever, and this has impacted how student affairs programs prioritize spending (Schuh, 2009). There will likely never again be a time in which the leadership of a fraternity/sorority advising program (FSAP) will not have to justify the level at which their department is funded and how those monies are used. Therefore, we must think creatively about documenting why we are funded as we are and how we use those monies.

FSAP likely generate revenues through some combination of Division of Student Affairs budget allocations (commonly called Educational and General Program allocation or E&G), student fees (sometimes specifically assigned for a function such as fraternity and sorority programs and assigned to all or some portion of the student population), fundraising (such as grants or endowments for leadership programs) and sometimes fees to participate in programs (i.e. Panhellenic Formal Recruitment Fees). Whatever combination of funding sources, having a framework to determine what funding priorities should be and how to document those priorities is vital for a FSAP.

The Council for the Advancement of Standards (CAS) provides standards and guidelines for FSAP (CAS, 2015). The FSAP Standards, last revised in 2012, can be one source of information to determine financial priorities and provide evidence as to how monies are used to advance important program outcomes. This article explains some of the CAS standards pertaining to the management of FSAP financial resources and how a FSAP might be able to make the case to maintain and increase funding after using the CAS Self-Assessment and Program Review process.

Overview of CAS
FSAP Standards

As with all 44 department specific CAS Standards, the FSAP has 12 sections focusing on each aspect of managing a program:

1	mission
2	program
3	organization and leadership
4	human resources
5	ethics
6	legal policy and governance
7	equity, access and diversity
8	internal and external relations
9	financial resources
10	technology
11	facilities and equipment
12	assessment, evaluation and research

Within each area there are standards ("must" statements) and guidelines ("should" statements). These statements reflect the recommended infrastructure for high-performing programs (CAS, 2015).

One of the many uses of the CAS Standards is to conduct self-assessment, or an internal review of how the program is performing (Arminio, 2009). Using different sources of evidence to document how a program is performing is vital to provide documentation for each of the standards within the FSAP (Bureau, 2011). As mentioned, there is a need to collect evidence for each of the 12 sections of the CAS FSAP standards. One part is financial resources. In the next section we review how a campus can provide evidence to document its use of and potential need for increased financial resources.

CAS Financial Resources Standards and Examples of Potential Evidence

There are seven financial resources standards within the FSAP CAS Standards.

The first is "Fraternity and Sorority Advising Programs (FSAP) must have funding to accomplish its mission and goals." Vital here is the connection between funding, mission, and annual goals. Annually reviewing your mission and goals and identifying the ways you need and use your budget should become a core practice to document that you connect budgeting and planning. For example, if a goal is to increase the number of programs or services, do you have the financial resources, including staff salaries, to make that goal happen?

You should also tie certain funding sources to the appropriate goals. For example, in the case of the University of South Florida, student fees comprise all of the salaries of staff. Therefore, goals may be developed to ensure staff interact with students both in and outside the fraternity and sorority community (FSC). Documenting current practices is important in the self-assessment process. Evidence for this standard might include the provision of the mission and annual goals mapped to how you spent your budget.

The second standard includes four focal areas of budgetary analyses: "In establishing and prioritizing funding resources, FSAP must conduct comprehensive analyses to determine (1) unmet needs of the unit, (2) relevant expenditures, (3) external and internal resources, and (4) impact on students and the institution." Ultimately, this standard asks the FSAP to document how current and potential practices are impacted by the budgeting model. Through good assessment, the FSAP might be able to determine how the revenues provided to the department are sufficient to meet all expenses.

Questions Include:

- Should expenses surpass revenues, what are ways to supplement the funding model?
- Are there partnerships that can be created to assist with program funding?
- Are all expenses relevant to the successful administration within the FSAP (i.e. do you really need to fund that program anymore or should you increase the cost of attending the leadership retreat to make up the budget shortfall?).

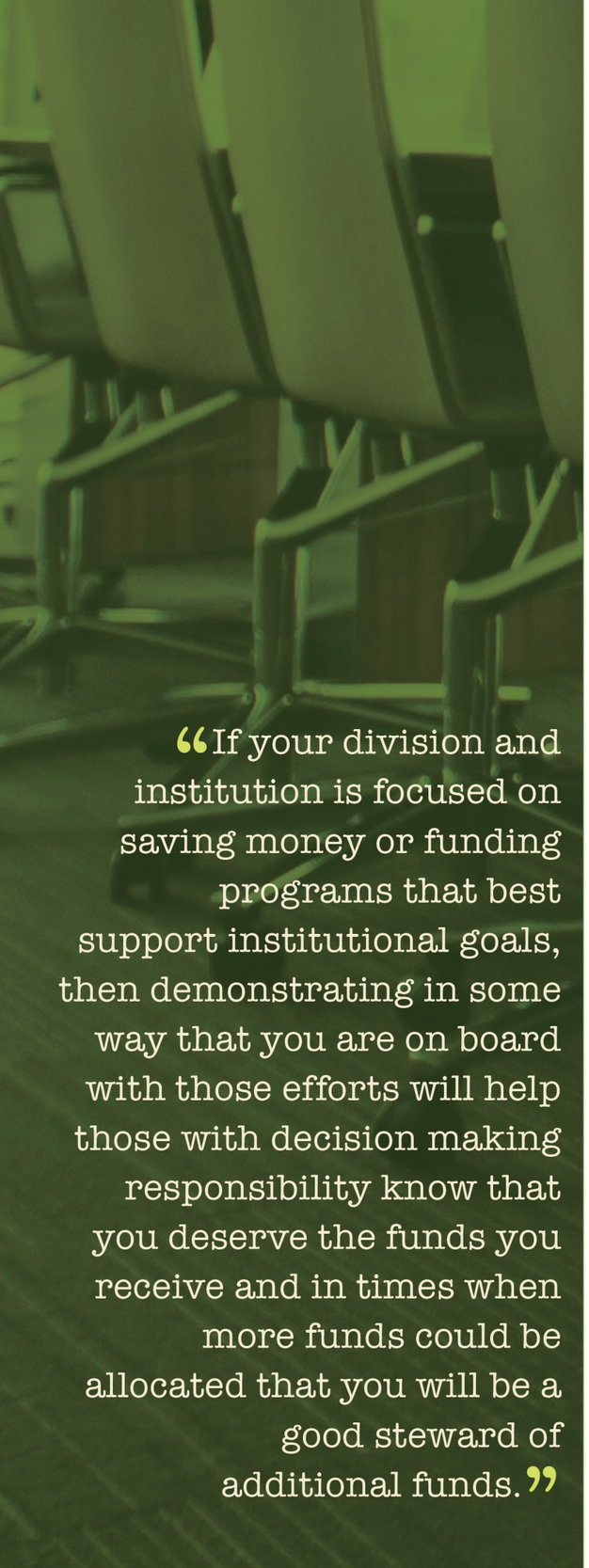
When those questions are answered, the FSAP might think creatively about how to supplement budget short falls: can fees be increased or fundraising be enacted (internal and external resources)? Evidence about breadth and depth of program and learning outcomes can help make the case for more money in today's higher education environment: does your program have sufficient evidence of positive outcomes that your supervisor might allocate some extra funds the next year (impact on students and institution)?

Another way to document how the current departmental practices influence the budget model and vice versa would be for the FSAP to list all of its current programs and services connecting each program and service to a percentage of the budget and a funding source. In addition to current programs and services, list those that might be of interest to implement. Listing the programs and services you want to enact but do not have funds for in this same document is a way to not only identify gaps, but to also assess priorities: for example, if you currently allocate 10% of your student fees budget to an awards dinner, but students are not that interested in coming could you allocate that 10% to some other initiative?

"Evidence about breadth and depth of program and learning outcomes can help make the case for more money in today's higher education environment: does your program have sufficient evidence of positive outcomes that your supervisor might allocate some extra funds the next year (impact on students and institution)?"

The third standard connects the department to institutional goals and mission: "FSAP must use the budget as a planning tool to reflect commitment to the mission and goals of the programs and services and of the institution." Throughout the CAS standards there is a strong sense that individual functional areas within the division of Student Affairs (or wherever positioned in the institutional hierarchy) must be aligned with the overall mission and goals of the institution. This is more than a financial planning matter: it is a planning and assessment matter. It is also a philosophical matter: to what extent do we want fraternities and sororities to sit as central to and not in the margins of colleges and universities.

Because institutions fund what they value (and values come from a wide range of impetuses) the annual budgeting process is a chance for FSAP to


“If your division and institution is focused on saving money or funding programs that best support institutional goals, then demonstrating in some way that you are on board with those efforts will help those with decision making responsibility know that you deserve the funds you receive and in times when more funds could be allocated that you will be a good steward of additional funds.”

demonstrate how their programs and services are implemented because they add value to the overall institution. Some departments simply get a budget and some will need to present (and sometimes as part of a larger activities or involvement office).

Whatever you do, be ready to defend how monies allocated to staff and operations directly impacts the ability of the FSC to contribute to the campus community. When asking for more money for enhancing staff, try to convey how that person will reach more students, not just that the current staff will have less to do.

The fourth and fifth standards require the FSAP to document their stewardship of the financial resources of the institution: “FSAP must administer funds in accordance with established institutional accounting procedures” and “FSAP must demonstrate efficient and effective use and responsible stewardship of fiscal resources consistent with institutional protocols.” Each institution allocates and manages departmental budgets in a way that makes sense for them. Particularly at institutions at which student fees make up a large portion of the budget, it is important to remember that there may be increased controls to ensure proper use and management of funds. Documenting how the department and possibly the councils and even chapters that might have accounts through the institution are managing funds is important.

Evidence for these standards may be quarterly reports you have about reconciling budgets. It might be documenting the meetings you had with staff and students to review protocols and review budgets. To document standards such as these, it is best to directly connect to the policies that govern your institution.

The sixth standard highlights the important role of ongoing documentation of how funds are spent: “Financial reports must provide an accurate financial overview of the organization and provide clear, understandable, and timely data upon which personnel can plan and make informed decisions.” Because many FSAP have some level of influence/management responsibility for council budgets, this may be a standard for which you document how often those budgets are reconciled as well as how those monies are spent.

Throughout our years in student affairs, we have been placed in scenarios where our councils and departments will come up on the end of the fiscal year and have more money than we have used. There have been scenarios in which we basically said “we need to use it or lose it.” How you use it now may actually influence if you lose it later. While documentation is one factor of this standard, underlying its importance is a philosophy about funding what the program/department values. If you use it by having year end pizza parties at council meetings or stocking up on post-its (and we know post its are important) that may send a message that you do not really need the funds to administer programs and services that are connected to the mission and goals of the department and institution. You need to have celebrations of accomplishments and you need office supplies, but ultimately you need to demonstrate that funds directly connect to the impact that staff can have through the programs and services that the department can administer.

Finally, the last standard serves as a catch all for how procedures for procurement, or the overall act of obtaining or buying goods and services, are followed: Four bullets within the standard explain that

Four bullets within the standard explain that procurement procedures must:

- Be consistent with institutional policies.
- Comply with laws and codes for usability and access.
- Ensure the institution receives value for the funds spent.
- Consider information available for comparing the ethical and environmental impact of products and services purchased.

Inherent throughout the standard is a sense that you must not only use the funds well, but that you must adhere to how the institution prioritizes and enacts spending beyond just policy. For example, you might think that given all things relatively equal, buying a chair for $500 over the one for $350 is not a big deal, but in tough budget times how your department demonstrates that you are “in this together” and willing to cut costs, even small amounts, can send a message to your department/division’s financial officer that you “get it.”

Extending the example of the chair further, evidence for this Standard might include any sort of documentation you had for chair options highlighting the one you purchased or documenting the amount of time spent on emails and in front of a computer that merits the purchase of the ergonomic chair over the other chair. This example may seem minor and the documentation process might seem to not be worth the while, but when it comes down to it, if your division and institution is focused on saving money or funding programs that best support institutional goals, then then demonstrating in some way that you are on board with those efforts

will help those with decision making responsibility know that you deserve the funds you receive and in times when more funds could be allocated that you will be a good steward of additional funds.

In closing, the CAS FSAP Standards provide an outline for departmental infrastructure. One part of that infrastructure is managing financial resources. This article outlined the seven Standards within the FSAP Standards related specifically to financial resources. These Standards reflect the importance of good and responsible stewardship of monies, frequent review and revisions of budgets, assessing programmatic and learning outcomes to provide documentation of how funds spent are a good return on investment, and knowing and managing policies that are departmental, divisional and institution wide. Using these Standards, a FSAP can document how its current use of funds is in line with institutional priorities and how additional funds might enhance the extent to which the FSAP can achieve those goals.

Dan Bureau is the Executive Assistant to the Vice President for Student Affairs. He has worked in higher education for 20 years serving in a number of roles including as a campus based fraternity/sorority life professional and volunteer. He was the 2004 AFA President and currently is the Association's liaison to the Council for the Advancement of Standards in Higher Education (CAS).

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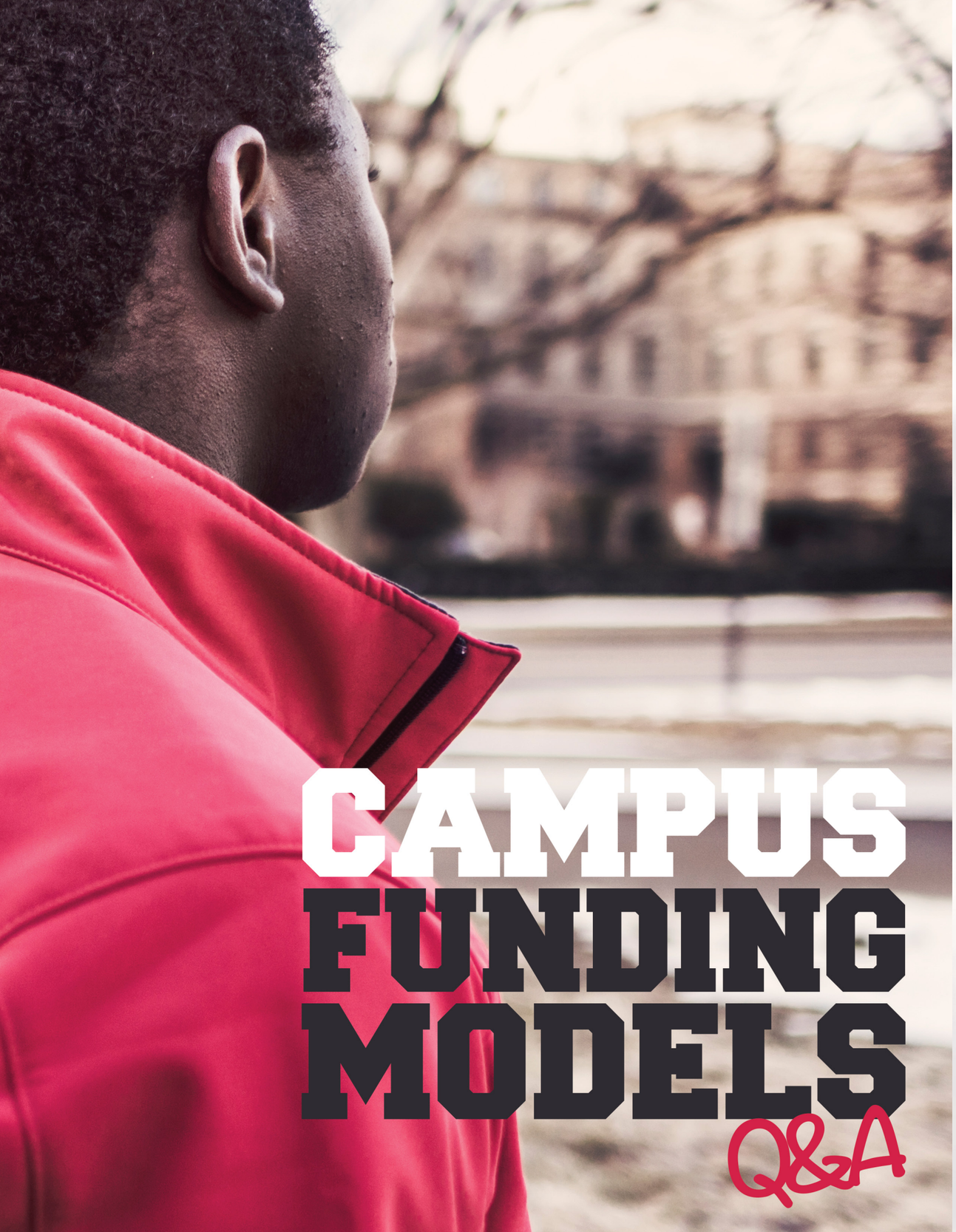

CAMPUS FUNDING MODELS Q&A

How each campuses supports resources for the fraternity and sorority community vary drastically based on institution type, size, location, history, staffing, and more, including the makeup of the student body. We decided to explore four main models: departments/offices funded primarily through university allocations, those funded through a combination of allocations and student fees, those funded primarily through student fees, and finally those who have an income from an endowment. It is important to note three things:

- None of these models exist within a vacuum - each uses a combination of funding sources
- Implemented any of these models means first adapting them to a specific campus
- In each case, you will see that there are pros and cons to consider

MODEL: Primarily University Allocations

Christian Brothers University

The idea of funding a Fraternity & Sorority Life office entirely through institutional allocations can be a daunting concept. When I arrived at Christian Brothers University and encountered this funding structure, I realized that this model is not only possible, it has a number of direct benefits for our students. With those benefits, however, come challenges that our community has had to overcome with creative solutions.

By shifting the financial burden of funding the Fraternity & Sorority Affairs office from the students onto the institution, Christian Brothers is able to fulfill one of its core mission principles: creating an accessible community for as many students as possible. For example, without the requirement to contribute funding to supplement the office, chapters are able to keep membership fees for their members lower. This empowers chapters to create opportunities for more students to reap the benefits of membership in a fraternity or sorority. Many students at Christian Brothers University are first-generation, low-income smembership is helping us create a more diverse and welcoming community for our campus as a whole.

As previously mentioned, this model is not without its challenges. In order to provide educational programs and fund travel for conferences, the community had to learn how to partner not only with the fraternity/sorority life office but with each other to develop solutions that worked for all of our chapters. In order to balance the lack of funds generated through a student fee, our students serve as office support staff and host campus programs for non-members that generate revenue. We often lean on our larger chapters to appropriately staff events with their members.

For institutions looking to adopt this structure or searching for ways to maximize the benefit of this format, it is important to remember it will not be successful without student buy-in. Effectively engaging your chapter leadership, local alumni, and headquarters staff is essential to ensuring that this model remains viable. Make sure you are not only communicating with your community about the needs of your office; invite your members into the conversation. Foster a sense of ownership in the community with this funding style, and your members will be better positioned to champion your initiatives, support their individual chapters, and make your community a successful one.

Model: Combined University Allocations & Student Fees

Stetson University

Institutional budgeting practices in our field vary as much as position titles, and many professionals find layers of complexity when allocating resources around several factors. Questions such as "Is it appropriate to use student fee dollars on programs which benefit specific groups?" and "What should the governing councils pay for versus what our offices should?" may arise and shift priorities depending on your institution type, location, strategic plan, and mission. The way an advisor approaches their annual budget at a large Midwest public land-grant institution might vary widely from how they would at a small private liberal arts college in the Northeast. In my experience, decisions are typically based on individual governing philosophies and funding sources, such as institutional operational dollars, endowed programs and/or positions, student activity fees, such as institutional operational dollars, endowed programs and/or positions, student activity fees, fraternity/sorority student fee dollars, council and chapter funds, special grant funds, and scholarships.

For example, Stetson University employs a mixed funding model where the operational budget for the Office of Fraternity and Sorority Involvement is sourced from the following: two-thirds from institutional operational dollars and the remaining one-third comes directly from student activity fee monies.

In addition to this, chapter and governing councils financially support specific operations within the sorority and fraternity community through their budgets, bringing in speakers and programs while providing other services to their members and campus as a whole.

The current mixed funding model we employ has both potentially positive and negative aspects:

PROS	CONS
Multiple sources provide an opportunity for buy-in across councils and student government.	Tethering a third of the budget to a student activity fee may leave it vulnerable to potential fluctuations in enrollment.
The office better aligns and maximizes overlapping strategic goals using these multiple sources as a baseline for how funds are spent.	Utilizing multiple sources can potentially lead to conflicting philosophies on how the funds are (or should be) spent.
More than one funding source provides a better opportunity to increase the overall budget through diverse revenue streams.	Training and buy-in for council spending versus office spending happens outside institutional budgeting processes, which may vary with new leadership.

When determining if you should implement (or expand) a mixed funding model, consider the following:

- Where does our budget come from currently?
- Are there untapped opportunities for growth through other sources?
- Are we currently funded at the level we need to be and, if not, what would that look like?
- What should the institution fund each year?
- What role do students and/or councils play in funding decisions?

Identifying creative sources for funding and additional support while determining how your undergraduate councils/students can literally "buy in" to the direction of sorority and fraternity life is crucial when considering this models and your philosophy guiding them.

Model: Primarily Student Fees

University of Pennsylvania

The Fraternity/Sorority Student Development Fee was instituted in 1982 by the Greek Alumni Council working with University officials. It was set up in response to (influential) alumni believing that the current level of administrative support, resources and programming was insufficient to properly support an historic fraternity/sorority community. It currently sits at about $85.00 per Greek member per year (so at the current rate generated about $272,000 annually), and provides about 52% of the overall operating budget for the Office of Fraternity Sorority Life, including salaries and operating budget. It is set so that every other year it is raised by about $5. The fraternity/sorority facilities management fee is raised on the "off" years, also on a set schedule. The fee is assessed on the Bursar's bill every fall for all returning fraternity and sorority members. It is also assessed (in full) in the Spring for all new members who have joined that academic year (fall upperclass new members and spring new members).

The pros of the model is that it provides a more reasonable set of resources and staffing for a fairly large, historic fraternity system (Penn's fraternity community has been present, uninterrupted on Penn's campus since 1849). As the community grows, so does the financial resources to support that community. It is also set up so that if University resources were not increased or decreased, the Greek Alumni Council, OFSL, and student governing councils could choose to raise the fee slightly more as necessary. In comparison to the other "fees" charged at Penn (technology fees, activity fees, and various course fees), the amount is small and reasonable but provides tremendous impact on the community.

Cons of the fee is that it does add to what are often perceived as high fees for membership in fraternities and sororities. This is particularly true for those students who come from financially disadvantaged backgrounds, are on financial aid since this usually doesn't fall within necessary academic costs covered by Financial Aid packages. There are times when it may have made more

sense to be broken down and charged each semester for those only involved in those semesters (for those who join in the spring, those studying abroad for a semester, etc.).

Overall it was a tremendous resource and help in administering a vibrant fraternity sorority community. I would be wholeheartedly in favor of instituting this at other institutions with one caveat—perhaps building in a small percentage of members who could apply for "financial hardship" or fee scholarships either through OFSL or their chapters or alumni/ae. But overall I believe it was fair. Non-members weren't footing the bill for support and resources for organizations of which they were not a member.

It helped not only with salaries for a staff size appropriate for the community, but also allowed us to bring in regional and national speakers and resources for leadership training, alcohol/hazing/sexual assault training, recruitment training, etc.

Model: Endowment

Miami University

Historical Perspectives

Fraternity/sorority life plays an important role in developing students and enhancing their experience at Miami University. During a previous capital campaign it was identified as a priority of student affairs to raise money for the fraternity/sorority community.

A donor who had previously given to the community annually for over 10 years was identified and cultivated by the Student Affairs and Office of Development. The departments worked in collaboration in cultivating the donor and eventually solicited them to create an endowment in support of the community. In recognition of this gift, we named the office in honor of the donor.

Pros

As a result of the endowment, we have an endowed account to encourage future large and small donors to support the community

The endowment principal, currently over 1 million dollars, annually distributes based on endowment performance approximately $50,000 a year.

This allows for our department to budget $50,000 in leadership development programming opportunities for our fraternity and sorority community annually.

The guarantee of the funding allows for sustainable programs and signature events that happen every year.

Cons

Perception about funds available is we have a lot more money than we really do.

Things to Consider:

Use caution when setting up the agreement to make the endowment description broad enough to have some flexibility in the usage of funds. Having the flexibility under the "leadership programming" umbrella has made all the difference for us.

Large endowments are not usually the first gifts donors give, it is important to set up vehicles for even small initial gifts to go to community wide initiatives. Once a donor is engaged in the community at large, it's much easier to cultivate a larger gift for a community wide fund.

Contributors:

Zachary Knight serves as the Director of Student Activities & Assessment at Christian Brothers University, where he partners with students to develop a vibrant and educational fraternal culture. His passions include fostering student development, designing effective assessment tools, and exploring new ways to make higher education accessible to everyone.

Michael Kumler joined Miami University in 2003 and has served in a variety of annual and major gifts roles. He is currently responsible for leading all major gift and fundraising activities for the Division of Student Affairs, Graduate School, University Libraries, Honors Program, Club Sports, Equestrian Program, and Parents/-Families Programs. He is also a member of university-wide Principle Gifts/Leadership Gifts committee.

Matt Kurz currently serves as the Director of Student Development & Campus Vibrancy at Stetson University in beautiful DeLand, Florida. He has worked as a higher education professional in student affairs for nearly ten years, and is a proud member of Phi Kappa Psi fraternity.

Jenny Levering is currently serving as the Director of Student Activities and the Cliff Alexander Office of Fraternity and Sorority Life at Miami University. Prior to joining the Miami community, Jenny worked at the University of North Carolina at Chapel Hill in the Dean of Students Office working with Fraternity and Sorority Life. She's been a member of the Association of Fraternity and Sorority Advisors since 2002. She holds a Masters Degree in Student Affairs in Higher Education from Ball State University and a Bachelor's Degree in Communications from Loyola Marymount University in Los Angeles.

Dr. Scott Reikofski is a 33 year higher education/student affairs veteran, spending the his entire career supporting fraternity/sorority communities primarily as a campus Greek advisor, national board member or foundation board member, and as a campus and organizational consultant, speaker, and program designer (www.scottreikofski.com). Scott is currently enjoying new challenges exploring medical education as the Director of Student Affairs at the University of Arizona College of Medicine - Phoenix.

HQ FUNDING INTERVIEWS

There are a myriad of ways to fund a headquarters, especially when considering how much each varies in mission, organization membership, income (both dues and donations), location, staff size, available services, and more. How an organization is funding and how it chooses to use those resources has a significant impact on daily operations.

Join us as seven fraternity/sorority officers walk us through their funding model, their decision making process, and the relationships with their foundations.

how is your headquarters/fraternity/sorority funded?

Delta Phi Lambda: Our organization is funded by membership dues and fees. This includes new members and expansion prospects.

Delta Sigma Phi: We are funded primarily by membership dues (95%). Our Foundation provides a grant every year to supplement our educational programming, and we receive a small amount of revenue from royalties from merchandise sales. Our bi-annual conventions do not generate revenue.

Phi Iota Alpha: Phi Iota Alpha is mainly funded by membership dues (alumni and undergraduate) and membership applications fees.

Pi Lambda Phi: We are mostly funded by membership dues from initiated undergraduates and new members. We do not typically receive donations for operations and do not charge alumni dues. We sometimes get grants from our Educational Foundation to conduct programming such as Convention.

Sigma Alpha Epsilon: The Fraternity is funded primarily through annual membership dues and fees remitted by undergraduates. Some of the Fraternity educational programs receive partial grant funding from the SAE Foundation

Sigma Tau Gamma: For years, the Fraternity relied on membership dues and fees alone. Like any good company, the Fraternity's leadership realized some time ago that we need to look for additional revenue sources. One source of additional revenue has come from our relationship with Affinity Consultants. They manage our brand and help the Fraternity receive royalties for various products purchased by our members. In addition to royalties we also have seen increased merchandise sales. The Fraternity also receives a grant from the Sigma Tau Gamma Foundation that supports our Webb Academy program, which is held each January.

how does your organization's funding and/or funding model play into your decision making?

Delta Phi Epsilon: Our organization is forward thinking in that we create a budget annually that meets the needs of our strategic plan. We work with our income to make it stretch to accomplish our goals. We do not limit our ambition because of finances. If there is something we want to accomplish, we find the means to make it happen. Sometimes that means other areas take a back seat while the focus is on the hot topic item. For example, over the past 10 years, our strategic focus has been on growth, both through extension and through chapter recruitment. A good percentage of our budget was allocated to that department to enable us to be competitive in the marketplace. This year our strategic focus is shifting to organizational infrastructure, resulting in a shift in budget from a heavy percentage in extension and recruitment to a heavy percentage in alumnae services and training. Like in life, that which you focus on grows. You cannot focus on two things at the same time. One must win out over the other in order to truly realize your goals.

Pi Lambda Phi: As we can only work based off what our students provide, we either have to increase dues or increase membership to do significantly more. Therefore, we have focused largely over the past five years on expansion. Membership growth through current chapters is largely not noticeable across the board, therefore, we know if we expand well we can add 30+ members per chapter and with three expansions per year (our recent average) that equates to another 100 members per year. Over five years of expansion, that is a big change. We invested in expansion to drive total revenues so that we could then invest into other things – more staff, programs, resources, etc.

Sigma Alpha Epsilon: Our organization's funding model can impact our staff and travel but does not play into discipline of or closure of chapters. We are a budget conscious organization and work to maximize our impact based on the projected funding available to effectively operate the Fraternity. We have expanded our educational offerings while maintaining existing programs despite closing 30 chapters over the last 3 years.

Sigma Tau Gamma: I am constantly looking at numbers – our recruitment numbers, our program attendee numbers, our collection efforts all in an attempt to truly understand our financial position. Knowing what income we have coming in the door helps me evaluate where we may need to make staffing changes or where we may need to increase one budget and decrease another. Thankfully, Sigma Tau Gamma is in a strong financial position, so I can watch trends and adjust as necessary without having to make immediate changes to the size of our staff, who can attend our programs, where we start new chapters, etc.

Delta Phi Lambda: Our organization's funding plays a huge role in our decision making. With our operations largely funded by membership dues, we have to be more thoughtful and intentional with our programming, initiatives, and how we budget each year. Although our current national headquarters staff are all volunteers, we would like to eventually move in the direction of paid staff.

Delta Sigma Phi: We have a financial model that projects expected revenues and expenses over ten years. The most robust and reliable information, of course, is for the next three years. We update our financial model every year. This information allows us to plan for the future and ultimately make decisions related to how we can improve our service to our members – both in providing more staff resources and in growing our educational and leadership programs. As we continue to develop our Foundation efforts, we are finding more donors to support specific educational initiatives that would not otherwise be affordable.

Phi Iota Alpha: It doesn't. We make decisions based on common sense. Unlike our NIC peers we do not have a physical headquarters nor do we have paid staff. Closing a chapter for us does not affect the bottom line so if we have to close it we close it. We pick Convention locations based on the affordability for our members; especially our undergraduate brothers. Convention pays for itself through fees.

what

role does your organization's foundation play? How do you work with your foundation?

Delta Phi Epsilon: We are an enterprise, where all pieces work together as partners. We share an international executive director and many IHQ staff do work for all three non-profits (housing, foundation, and sorority). This creates an economy of scale.

Delta Phi Lambda: Our foundation raises money annually to fund scholarships for our members, both undergraduates and alumnae. They have partnered with AFLV Central to provide 3 full scholarships to members of Delta Phi Lambda. If none qualify, these scholarships are available for any member of a NAPA organization. The Foundation also provides scholarships at our Annual Convention for Leadership, Academic Excellence, and the Hannah Seoh Alumnae Scholarship.

Delta Sigma Phi: I am the joint CEO of both the Foundation and the Fraternity, so we have well-integrated operations. Our COO also serves both organizations. A significant benefit to this structure is that there is no disconnect in the messaging and priorities between the two organizations. We are thinking in tandem about the needs and interests of each – how we can create the best impact for our members, and how we can better articulate that impact to our donors so they are inspired by how we are putting their gifts to work.

Phi Iota Alpha: We currently do not have a foundation. With that said, we are in the process of establishing one, and once established, it will provide scholarships for our brothers to help pay for our educational program. Our foundation will also have an external component to help our Latino community.

Pi Lambda Phi: Our foundation fundraises largely for scholarships and occasionally to provide grants to help offset educational programs like parts of Convention. We advertise the scholarships. We have a paid staff member who now is helping run the Annual Fund and is working to launch a capital campaign. For many years (12+) we had no paid staff running our foundation so this is a good thing. The eventual goal of the capital campaign is to endow programs and scholarships and help with some operational components that could make our foundation stronger.

Sigma Alpha Epsilon: The SAE Foundation helps fund our annual Leadership School with a grant. It also maintains donor-managed funds for many individual nationwide and chapter-specific scholarships. Individual and chapter-specific scholarships are awarded and can help offset academic-oriented expenses or offset the cost of attending educational events (both internal and external to the organization).

Sigma Tau Gamma: Our Foundation's role is significantly growing. For us to stay competitive and offer the kinds of educational programs our members need and deserve, we need to see the size of our foundation grant significantly increase. This is not lost on our Foundation trustees, so they are working hard to reach out to new donors and grow our base of support. I estimate that we will need eight times the funding we currently receive from our foundation by 2020, which means that we have significant funds to raise in the coming years.

contributors

Deran Abernathy, Associate Executive Director
Sigma Alpha Epsilon Fraternity

Nicole DeFeo, Executive Director
Delta Phi Epsilon Sorority

Patrick Jessee, Executive Director and CEO
Delta Sigma Phi Fraternity

Steve Latour, Chief Executive Officer
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Delta Gamma
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TYLER C. WALSH

IT'S A CULTURE CHANGE NOT A BUDGET INCREASE

Alumni are essential to the perpetual growth and increasing health of fraternities and sororities and the communities to which they belong. They are lifelong stakeholders through the strong relationships they build. They support their organizations, the fraternity/sorority community, and their institution by giving of their time, talent, and treasure.

Ideally the passion and loyalty one develops during their time as an undergraduate member would continue and potentially strengthen throughout their lifetime.

Alumni must have an engaged presence within the life of the fraternity/sorority community and their individual chapter. It is in such symbiotic partnership that local chapters and the fraternity/sorority community will flourish as will alumni.

Engaging alumni is important but has many challenges. Often the problems come with prioritization and allocation of funds. Resource barriers happen at all levels of our industry, from the local chapter to the fraternity/sorority community to the inter/national organization. Focus and resources are put on the most immediate need. Whether that focus is on undergraduate recruitment and leadership programming or risk prevention and crisis management, it quickly moves away from the "long game." When the focus shifts, so does the funding.

As with most ideas, programs, and initiatives, one key indicator of success is how well it is funded. Just look at startup companies. If the upfront capital is not sufficient, the probability of a successful, long lasting company emerging is slim. However, when we think about alumni engagement, we need to challenge ourselves to look past the financial barriers that we most likely face when reviewing the annual budget.

Companies have made a fortune developing products and systems to help organizations and institutions manage alumni relations programs. Products such as state of the art databases, alumni-centric communication portals, and shiny brochures and mailers are great tools that can help engage alumni, but they are not the only solution.

Creating a culture of alumni engagement is a mindset. While changing a culture and creating a new norm can be daunting work, it does not have to break your budget. There are basic tools that you can use to instill a culture that not only engages alumni, but also gains valuable new resources from those individuals. Once your stakeholders are engaged, they are much more willing to commit their time, talent, and treasure to your community and their organization, which makes for a stronger experience across the board.

When budgeting resources—both time and financial—one should consider five primary focus areas:

- **PLANNING**
- **PARTNERING**
- **THANKING**
- **RECYCLING**
- **INVOLVING**

PLANNING

The first step in a successful engagement program or plan is to envision the results while setting objectives and goals. Proper planning will lead to greater results in a shorter timeframe. When envisioning an alumni engagement program, it is important not only to plan and execute one focus area at a time, but also to realize that components of each area must be developed and executed simultaneously and continuously.

Allocating time is a challenge. Taking time away from the "fire of the day" is never easy. Removing yourself and your staff from the normal day-to-day occurrences may feel awkward and counterproductive, but focusing on the future will prove worthwhile. Consider setting aside some time each day or week where focus can shift toward envisioning and planning.

PARTNERING

Partnerships between an institution's advancement or alumni office, the inter/national fraternity or sorority headquarters, and the local chapter leadership (including undergraduates and alumni is vital. Each group has the same overall goal in mind and is working with a cross section of the same alumni population. These groups should be seen as partners in an engagement endeavor, not the competition.

Finding friends and colleagues that work or volunteer for each of these groups is not hard. I venture to guess that regardless of whether it is the Vice President for Advancement or a volunteer Chapter Advisor, a shared goal is to better engage alumni. Forming these relationships will not cost anything and will likely prove to be priceless.

RECYCLING

Communication plays a vital part in an alumni engagement program. Keeping alumni up to date on the actions of the good work of their fraternity or sorority and their college community as a whole is important. Regular communication should help alumni form and maintain their passion. Since alumni can lose touch with their brothers/sisters, chapter, inter/national fraternity or sorority, and institution quickly, a constant flow of information is necessary.

Budgeting plays a major role in communication because costs can escalate quickly. It is easy to immediately jump to purchasing a new brochure or mailing a stylish newsletter. This is where budget concerns may derail your efforts. Recycling current communication pieces is one way to keep costs down. Pre-existing publications can be used to deliver an alumni-centric message. Consider pushing content through an institution's alumni magazine and through (free) social media sites. Include alumni engagement tips in regularly scheduled messages to chapter presidents and officers. Most importantly, make sure that a majority of the content you are communicating is of interest to alumni or will help further develop alumni engagement. Communicate events, stories, and news that they care about regardless of what media you use.

INVOLVING

The opportunity to affect the future of their chapter, the institution, or simply to share in present activities are the keys to alumni engagement. Programming and opportunities targeted toward alumni must get them involved in the planning, communication, decision making, activities, and assessment of the activities.

You are already doing the heavy lifting on eventsevents and programming. You are already planning, executing, and assessing everything you do. The cost of this is already built into your budget. Widening your net and bringing in alumni to share in the experience is cost neutral. Not to mention that a new perspective may yield unknown advancements.

Sustained growth of fraternities and sororities requires building relationships with alumni that make them feel invested in the experience and responsible for the success of their chapter. An intentional stewardship plan is essential to the success of that relationship building, as it recognizes alumni and makes them feel appreciated.

THANKING

Sharing success stories, calling a volunteer, donor or engaged alumnus/a on the phone, or writing a quick, four sentence thank you note is thoughtful, not costly. When engaging alumni is a part of your culture, a strong sense of gratitude must be present. Being thankful, appreciative, and grateful is the best thing you can do to spur future engagement.

Alumni relations is an essential function. Just as we could not thrive without undergraduate recruitment, leadership programs, risk prevention, or our commitment to our organization's principles, we cannot succeed without a vibrant and engaged network of alumni.

We need engaged alumni who interact regularly, who feel a strong sense of loyalty, and who invest themselves in the advancement of the fraternity/sorority experience. A partnership between you and your alumni is essential to the future progress of fraternity and sorority life. It is a culture change, not a budget increase.

Tyler C. Wash is the executive director of the Phi Kappa Tau Foundation. He has served on the Phi Kappa Tau Executive Offices staff since 2009. Throughout his tenure he has held several roles including coordinator of volunteer development, director of communication and director of development. He is actively involved with the Association of Fundraising Professionals and received a Certificate in Fund Raising Management from the Indiana University Lilly School of Philanthropy.

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